

January 2001

LEXINGTON 2020 VISION

**A Status Report
of the
Planning Process**

**Executive Summary
and
Volume I
Summary of Work Group and Core Participants Group Efforts**

*Lexington 2020 Vision
Lexington, Massachusetts*

TABLE OF CONTENTS

Executive Summary and Volume I Summary of Work Group and Core Participants Group Efforts

EXECUTIVE SUMMARY.....	i
INTRODUCTION AND TOWN-WIDE VISION.....	1
SECTION I: THEMES, GOALS AND ACTIONS FOR 2020.....	2
Theme 1: Promote and Strengthen Community Character.....	2
Theme 2: Foster Educational Excellence	4
Theme 3: Sustain and Enhance Physical Character, and the Larger Environment	5
Theme 4: Reinforce Connections Between Residents, Civic Organizations, and Town Government	6
Theme 5: Establish Open and Accessible Processes for Town-Wide Decision-Making, Planning, and Conflict Resolution.....	8
SECTION II: CONNECTIONS: COMMON THEMES AND CONFLICTS/TENSIONS.....	10
Transportation, Growth Management, and Sense of Community	10
Regional and State Cooperation	10
Civic Participation and Information Dissemination	11
Fiscal Decision-Making	11
Acknowledgment of Different Viewpoints	12
SECTION III: PURPOSE, HISTORY AND PROCESS.....	13
Strategic Planning Overview	13
The Initiating Committee	14
The Steering Committee.....	15
Lexington 2020 Process and Activities	16
Next Steps	25
SECTION IV: THE VISIONS	26
CPG Town-Wide Vision Statement	26
Fostering a Sense of Community	27
Educational Excellence	28
Managing Growth: Development and Open Space	29
Ensuring Productive Connections Between Citizens and Town Government	30
Transportation	31
Managing Fiscal Stability.....	32

Copies of the report are available at Cary Library, on the town Web site, and at the Town Managers Office. Please contact the Town Managers Office at 781-862-0500 for further information.

TABLE OF CONTENTS (continued)

Volume II Work Group Reports and Additional Materials

SECTION I: LIST OF PARTICIPANTS	I-1
SECTION II: PUBLIC COMMENTS RECEIVED	II-1
SECTION III: GUIDANCE FOR WORK GROUPS	III-1
SECTION IV: GUIDANCE FOR THE CORE PARTICIPANTS GROUP	IV-1
SECTION V: THE FUTURES FORUM	V-1
SECTION VI: LIST OF ADDITIONAL MATERIALS AVAILABLE.....	VI-1
SECTION VII: FINAL REPORT, FOSTERING A SENSE OF COMMUNITY.....	VII-1
SECTION VIII: FINAL REPORT, EDUCATIONAL EXCELLENCE.....	VIII-1
SECTION IX: FINAL REPORT, MANAGING GROWTH: DEVELOPMENT AND OPEN SPACE.....	IX-1
SECTION X: FINAL REPORT, ENSURING PRODUCTIVE CONNECTIONS BETWEEN CITIZENS AND TOWN GOVERNMENT	X-1
SECTION XI: FINAL REPORT, TRANSPORTATION	XI-1
SECTION XII: FINAL REPORT, MANAGING FISCAL STABILITY	XII-1

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EXECUTIVE SUMMARY
of the
Status Report of the Planning Process
Lexington 2020

January 2001

This Executive Summary presents a brief overview of the more detailed information found in Volume I of this report. The Executive Summary gives the reader a general sense of what the Lexington 2020 Planning Process has accomplished to-date, the process by which the planning was conducted, and the upcoming next steps. The Lexington 2020 process is an ongoing, dynamic one; this Executive Summary and accompanying Volume I reflect the state of the process as of January 2001.

The Lexington 2020 Vision Steering Committee was created by the Lexington Board of Selectmen, in consultation with the School Committee and the Planning Board, to undertake the Lexington 2020 visioning and strategic planning process. Since Spring 1999, the Steering Committee has been guiding and managing the Lexington 2020 process on behalf of the community.

This strategic planning effort builds on a long and important history of past initiatives. These initiatives - focus groups, community conversations, and a survey - were crucial building blocks for future planning efforts. In 1998, an Initiating Committee developed a methodology and detailed step-by-step description of the strategic planning process that made sense for Lexington. The Initiating Committee evolved into the Steering Committee with the charge to “make the process work.”

The Steering Committee envisioned a strategic planning process that, on a sustained basis, would engage a wide spectrum of the community in an organized series of discussions to create and implement a vision of the town’s future. The vision should emphasize that what one does today affects the future. The strategic plan should be well-grounded in shared goals and clarity of purpose about the key issues affecting the town. The Steering Committee believes that the strategic plan should be helpful in creating a framework that establishes strategic planning as a regular civic activity, to enhance municipal decision-making now and in the future.

Overview of the Process

To launch the process, the Steering Committee held a series of four public workshops in June 1999 to explore the important issues of concern in Lexington. A Fall Forum was then held in October 1999 to get feedback on specific, focused topics that came out of the four workshops. The most significant aspect of this strategic planning process was the formation, in January 2000, of six Work Groups and a Core Participants Group, composed of Lexington residents who volunteered their time.

Executive Summary

Their work was focused on six topics, developed from the comments received at the two events described above:

- Fostering a Sense of Community
- Educational Excellence
- Managing Growth: Development and Open Space
- Ensuring Productive Connections Between Citizens and Town Government
- Transportation
- Managing Fiscal Stability

As part of their Mission, each of the six Work Groups developed a Vision for their specific topic area. The Core Participants Group developed a Town-Wide Vision.

CPG Town-Wide Vision Statement (Written as in the year 2020)

The Town of Lexington prides itself on being a great place to live. Residents and visitors alike characterize it as a vibrant and active community, which places a high value on learning at all ages. Its residents and employees welcome the diversity of people who are attracted to Lexington and choose to call it their home and/or place of employment.

Lexington is, and will stay, a primarily residential community with a tradition of offering quality, broad-reaching municipal services. It is committed to preserving and maintaining a sense of community that includes its historic tradition, its public and private open spaces, and its public support for civic life. It strives, however, to maintain a range of affordability. Residents recognize that these qualities are always difficult to balance.

An open and structured process of community conversation and long-term planning help the town remain forward-looking. Major elements, which are consistently addressed and evaluated, include: fiscal responsibility; sustainability of natural and human resources; transportation issues; education; and regional cooperation and integration. Residents are invested in and rely on this process as they reconcile competing needs and interests.

Guide to the Report

The purpose of the two-volume “Status Report of the Planning Process” is to describe the Lexington 2020 Vision process and to present an integrated summary of the Goals and Actions recommended by the Work Groups (WGs) on each of their six topics.*

Volume I of the report presents the recommendations of the WGs, integrated into five Themes with accompanying Goals and Actions. The Actions listed in this report are just some of the approaches recommended by the WGs for achieving their Goals. The Goals and Actions are to be considered an agenda for discussion and consideration by the town as it plans for the future. Volume I also includes the Visions of the six WGs and the Core

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Participants Group (CPG), and a detailed description of the steps taken to carry out the overall process.

Volume II of the report provides the full text of each of the six WG reports, including the Environmental Scans, as well as information about the participants and other materials. Volume II also contains a copy of all the written comments received during the public comment period on the draft of this report. Two public meetings were held in October and November 2000 as part of the public comment period as well; comments from these meetings are also included in Volume II. The comment period ended on November 20, 2000.

Themes and Goals

The six WGs, with input from the CPG, created Visions, developed Goals for Lexington in 2020, and recommended Actions to help get there. The Themes and Goals provided below have been integrated and summarized from the recommendations of the WGs.

Theme 1: Promote and Strengthen Community Character

The town of Lexington possesses an aura of its own, based on a variety of characteristics: its place in history; its charm and sense of pride; the reputation of its schools and public services; and its strongly residential character. Many factors contribute to a very strong “sense of place” which is appreciated and cherished by residents. Which of these elements will remain in the coming decades and continue to serve as unifying forces within the town? What can Lexington control – and how?

Goals:

- Design and promote community gathering places and events
- Develop criteria and mechanisms for preserving the physical character of residential neighborhoods
- Provide increased housing options to promote diversity of income and age
- Create strong incentives to maintain and expand affordable housing
- Integrate transportation infrastructure and/or environmental aesthetics with commercial districts, and historic and housing characteristics
- Preserve and maintain historical areas, and celebrate the town’s place in national history for residents and tourists

Theme 2: Foster Educational Excellence

Educational excellence is synonymous with the town of Lexington. The exceptional public education system is a result of the expectations and support of the town’s citizens. The community evidences an interest in life-long learning and in the multiple institutions which support that goal: the libraries, community education programs, preschools, private schools, the senior center, and numerous forums sponsored by a variety of community organizations.

Goals:

Executive Summary

- Ensure that all citizens are aware of and have access to life-long education and learning opportunities
- Continuously update and modify the programming, grounds and facilities, and materials and equipment of all educational and learning facilities
- Provide sufficient funding for educational and learning opportunities
- Develop and implement a town-run partnership program to promote the concept of community partnerships with all education and learning facilities (include business involvement, intergenerational learning, all governing bodies, students, families)
- Develop and implement an ongoing evaluation process for all systems associated with life-long learning

Theme 3: Sustain and Enhance Physical Character, and the Larger Environment

Lexington has a strong sense of tradition, historic preservation, and land conservation. Even though many decades of metropolitan growth have exacerbated problems related to traffic, noise, air and water quality, and housing costs, the town has maintained much of its historic character and small town scale.

Given Lexington's current zoning regulations and physical boundaries, only a limited amount of growth and new development is possible without major changes to the character of the town. Because of these limited opportunities, the type of growth that does occur must be the type that the town really wants and needs.

Goals:

- Improve traffic and parking conditions in Center
- Increase protected open space
- Preserve and enhance local air quality
- Reduce the environmental impact of households and businesses
- Limit traffic, noise, and pollution from Hanscom Field
- Increase alternatives to single occupancy vehicles

Theme 4: Reinforce Connections Between Residents, Civic Organizations, and Town Government

Lexington prides itself on its place in history; along with this comes the responsibility of ensuring that the democratic ideal of citizen participation in local affairs is upheld. This involves encouraging and providing a wide variety of opportunities for all residents to become involved in the initiatives and activities of local organizations and town government. The expectation is that an active and engaged citizenry contributes positively to all aspects of the community.

Goals:

- Expand information dissemination options for civic activities
- Provide approaches to inspire the uninvolved of all ages to become involved
- Increase accessibility/availability of government buildings, agencies, officials, materials, and services
- Encourage increased resident participation in and understanding of the fiscal process

- Promote use of volunteers (including students) and connect them with those needing services

Theme 5: Establish Open and Accessible Processes for Town-Wide Decision-Making, Planning, and Conflict Resolution

The Lexington 2020 Vision process has been characterized by increased and focused communication and conversation about a wide range of issues. Follow-up actions will require careful and consistent planning and ultimately, decision-making on the part of residents and town government. If these actions are to be successful, processes for encouraging and formalizing communication must be developed. Conflicts along the way are inevitable. They are a positive indicator that ideas are being shared and discussed.

Goals:

- Enhance and refine the fiscal process to make it useful and accessible to all residents
- Conduct and/or influence long-range studies, policies, and regulations in the areas of fiscal, transportation, technology, and environmental planning
- Initiate and/or participate in regional groups to resolve common problems, address common needs, capitalize on common strengths, and share services and resources in the areas of transportation planning, open space, environmental quality/monitoring, social services, and fiscal planning
- Re-evaluate periodically, through a participatory structure, the 2020 vision and planning processes
- Strengthen and support existing democratic processes for town decision-making

Common Themes and Conflicts

While the mission of each of the WGs was to explore and address a focused topic, there were overlaps, common themes, and some conflicts. This is a positive outcome of this effort in that it identifies and highlights the issues and tensions inherent in local planning. Once identified, these can begin to be addressed.

Among the issues highlighted are:

- The need to integrate transportation planning with development and growth planning;
- The effect of growth and development on the sense of community;
- The need for regional cooperation in transportation, housing, environmental, and other issues; and
- The differing definitions of fiscal stability.

One aspect of the next phase of the visioning and strategic planning process will involve examining the ways in which the Goals and Actions can facilitate more integrated planning efforts that address multiple aspects of an issue facing the community. This will involve making choices and tradeoffs among various Goals and Actions, as well as identifying where these can reinforce one another to achieve common interests.

Public Outreach and Recruitment

Executive Summary

The Steering Committee made repeated and deliberate efforts to reach out to all Lexington residents in seeking participants for the Lexington 2020 Vision process. It was the hope of the Steering Committee that the process would attract and engage those Lexington residents who had not been previously active in civic affairs. It was imperative that participants be representative of the range of interests, affiliations, and backgrounds present in Lexington. It was also imperative that the process for identifying and recruiting participants be open and available to all.

Six WGs were organized, one around each of the six topics identified above. One of the first tasks for each WG was to develop an Environmental Scan for its topic. Using the information from the Environmental Scan, each WG then created a Vision for its topic. This Vision was to describe what Lexington would be like in the year 2020 in the specific topical area. The Vision was to set the stage for determining priorities and establishing targets for performance.

Following creation of a Vision, each WG developed Goals, Actions, Objectives, Measures of Success, and Resource needs for its specific topic. Each WG then developed a report presenting its work.

The WGs met consistently from January to June to meet a rigorous schedule of document production and deadlines. In all cases, they pursued their mission with great focus and dedication. As volunteers on behalf of their fellow residents, they grappled with tough questions, and provided thoughtful consideration of the issues facing Lexington.

Another group, the CPG, was created to work in parallel with the WGs. Its mission was to act as a sounding board, focusing and integration agent, and “big picture” editor during the Lexington 2020 Vision Process. The CPG was to ensure that, at each step along the way, the work undertaken by the WGs as part of the 2020 process was reflective of the Lexington community as a whole and not perceived as representing special interests.

Like the WGs, the CPG also met throughout the first half of the year to discuss issues on its own and, most importantly, to review and provide feedback to all six WGs on each of their documents. The CPG also created a town-wide Vision of its own, a statement to serve as an overarching Vision for each of the six specific Visions. The CPG approached their review of each WG document and activity with great enthusiasm and careful thought and reflection.

Throughout the 2020 Vision process, the Steering Committee conducted a public communications effort to keep the public apprised of the 2020 Vision process and to actively encourage citizen participation at all events and meetings. Public materials and resources included: placement of items in the Lexington *Minuteman*; appearances of participants in the process on Lexington’s local access channel on cable TV; creating and maintaining a resource notebook at Cary Library; mailings to interested stakeholders; and initiation and maintenance of a Web site. Continued public discussion about the future of Lexington is essential to this planning process.

In Fall 2000, the Steering Committee held a public comment period on the draft of this report. Two public meetings were held, one in October and one in November, as part of the public comment period. At the discretion of the Steering Committee, some comments received have been incorporated into this report. A complete copy of all written and oral comments from the comment period is presented in Volume II of the report.

Next Steps

The next phase of the Lexington 2020 Vision process will involve presenting the information from the “Status Report of the Planning Process” through a variety of means to all residents, civic and community organizations, town meeting members, town Boards and committees, and town government staff for discussion and feedback. The Steering Committee hopes that by so doing, it will encourage reflection on the issues and discussion on a wide range of views.

The report of the Lexington 2020 Vision process (to-date) will serve as a guide for the town as it develops an approach to implementing Lexington’s goals and actions for the future. The Steering Committee expects that this process of visioning, community dialogues, and discussion will be ongoing, engaging, and fruitful.

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LEXINGTON 2020 VISION

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Summary of Work Group and Core Participants Group Efforts**

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INTRODUCTION AND TOWN-WIDE VISION

Lexington is at a crossroads; many opportunities lie ahead that can shape the course of Lexington's future. What will that future be like? What do Lexington residents want it to be like? How will the current actions of Lexington residents and government influence what the town will be like in 20 years? How can Lexington plan for the future it wants?

There are choices to make. Lexington can be a community marked by tension and unpleasant public discourse around matters of community priorities and resource allocation. (Independent of political perspective, this concern has been raised frequently by residents in various public forums.) Or, Lexington can be a community focused on meeting challenges in creative and collaborative ways, using consensus-based approaches to goal-setting and decision-making.

The Lexington 2020 Vision Process is a town-wide effort to empower and engage residents, and broaden community involvement, to help determine what the town of Lexington will be like in the year 2020. The process is a comprehensive, long-range, public visioning and planning effort for our community.

Since Spring 1999, the Lexington 2020 Vision Steering Committee has been guiding and managing the Lexington 2020 process on behalf of the community. The Steering Committee was created by the elected Boards in Lexington. The most significant aspect of the process so far was the formation, in January 2000, of six Work Groups and a Core Participants Group, all composed of Lexington residents who volunteered their time.

As part of their Mission, each of the six Work Groups developed a Vision for their specific topic area. The Core Participants Group developed a Town-Wide Vision.

CPG Town-Wide Vision Statement (Written as in the year 2020)

The Town of Lexington prides itself on being a great place to live. Residents and visitors alike characterize it as a vibrant and active community, which places a high value on learning at all ages. Its residents and employees welcome the diversity of people who are attracted to Lexington and choose to call it their home and/or place of employment.

Lexington is, and will stay, a primarily residential community with a tradition of offering quality, broad-reaching municipal services. It is committed to preserving and maintaining a sense of community that includes its historic tradition, its public and private open spaces, and its public support for civic life. It strives, however, to maintain a range of affordability. Residents recognize that these qualities are always difficult to balance.

An open and structured process of community conversation and long-term planning help the town remain forward-looking. Major elements, which are consistently addressed and evaluated, include: fiscal responsibility; sustainability of natural and human resources; transportation issues; education; and regional cooperation and integration. Residents are invested in and rely on this process as they reconcile competing needs and interests.

Section I: Themes, Goals, and Actions for 2020

SECTION I: THEMES, GOALS AND ACTIONS FOR 2020

The six Work Groups (WGs), with input from the Core Participants Group (CPG), created Visions, developed Goals for Lexington in 2020, and Actions to help get there. The Actions presented in Volume I of this report are just some of the approaches recommended by the WGs for achieving the Goals. Volume II of this report provides a full copy of each WG report along with a complete listing of every Action recommended by each WG.

The Themes, Goals, and Actions presented below have been integrated and summarized from the WG reports.

The six WGs were organized around the following topics:

- Fostering a Sense of Community
- Educational Excellence
- Managing Growth: Development and Open Space
- Ensuring Productive Connections Between Citizens and Town Government
- Transportation
- Managing Fiscal Stability

The Themes, Goals, and Actions presented in this report are to be considered an agenda for discussion and consideration by the town. They do not represent a finished “plan;” rather they are intended to serve as a guide for the town as it develops an approach to implementing Lexington’s goals and actions for the future. The Steering Committee expects that this process of visioning, community dialogues, and discussion will be ongoing, engaging, and fruitful.

Theme 1: Promote and Strengthen Community Character¹

The town of Lexington possesses an aura of its own, based on a variety of characteristics: its place in history; its charm and sense of pride; the reputation of its schools and public services; and its strongly residential character. Many factors contribute to a very strong “sense of place” which is appreciated and cherished by residents.

Which of these elements will remain in the coming decades and continue to serve as unifying forces within the town? What can Lexington control – and how? These are some of the questions that Lexington must face for the future.

The WGs recommended the following Goals and accompanying Actions to promote and strengthen community character:

¹ Theme 1 includes Goals and Actions derived from the Goals, Objectives, and/or Actions of the following WGs: Sense of Community, Productive Connections, Managing Growth, and Transportation.

- Design and promote community gathering places and events
 - Provide town government booths at events for info and comments
 - Zone business and commercial districts to encourage a “whole community” viewpoint for residence, shopping, work and leisure
 - Provide space, maintained by the town, for unstructured teen activities
 - Expand eldercare services
- Develop criteria and mechanisms for preserving the physical character of residential neighborhoods
 - Establish neighborhood council advocacy groups (with no legal authority) to promote and communicate with developers about the character of their neighborhood
 - Limit “mansionization” by establishing laws prohibiting the building or redesign of homes that would make them out of scale with existing houses and/or lot sizes
- Provide increased housing options to promote diversity of income and age
 - Enable cooperative housing for mixed generations
 - Enact zoning bylaw changes/incentives to create more smaller-scale age-restricted housing for the elderly
- Create strong incentives to maintain and expand affordable housing
 - Sustain ongoing affordable housing efforts
 - Pursue opportunities with federal, state, county, and town “surplus” land
 - Make the accessory-apartment laws flexible to allow more facilities to be permissible
 - Conduct equitable real estate tax assessments, including interior inspections
 - Modify zoning by-laws and create zoning overlay districts to allow and encourage development of higher density housing in areas close to retail centers and public transportation
- Integrate transportation infrastructure and/or environmental aesthetics with commercial districts, and historic and housing characteristics
 - Adhere to the town road repair and reconstruction plan
 - Reduce the effect of expanses of asphalt paving and provide scaling elements in commercial districts
 - Sidewalks: Survey conditions and existing network; prioritize and repair in timely fashion; develop plan for expanding network
 - Bike path: Survey conditions and prioritize repairs, enhance interaction between Minuteman bike path and town, as well as with other existing bike paths/trails
 - Implement traffic demand management initiatives (e.g. traffic calming measures, alternative transport modes)
 - Trees: Plant at least one new street tree for every tree removed; enhance and enforce existing bylaws regulating canopy tree planting and screening
- Preserve and maintain historical areas, and celebrate the town’s place in national history for residents and tourists

Section I: Themes, Goals, and Actions for 2020

- Locate, purchase and use appropriate means to preserve and maintain historically significant areas
- Provide information (signs, brochures, maps, kiosk) to alert tourists and residents to all points of historical import
- Improve visitors' center/gift shop, and information provided by staff there
- Outreach to tour companies
- Re-establish walking tours of Lexington

Theme 2: Foster Educational Excellence²

Educational excellence is synonymous with the town of Lexington. The exceptional public educational system is a result of the expectations and support of the town's citizens. The community evidences an interest in life-long learning and in the multiple institutions that support that goal: the libraries, community education programs, preschools, private schools, the senior center, and numerous forums sponsored by a variety of community organizations.

The WGs recommended the following Goals and accompanying Actions pertaining to Lexington's support of life-long learning:

- Ensure that all citizens are aware of and have access to life-long education and learning opportunities
 - Develop a consumer-friendly clearinghouse for all community life-long education and learning opportunities
 - Publicize all education and learning opportunities through multiple media
 - Employ diverse methodologies to provide classroom learning experiences to address the different gifts, talents, and special needs of all students
 - Clarify and convey high but realistic expectations to all students and citizens; foster critical thinking; facilitate creative thought and expression; infuse classroom learning with lessons of respect and cooperation
- Continuously update and modify the programming, grounds and facilities, and materials and equipment of all educational and learning facilities
 - Develop and implement a committee to ensure curriculum alignment throughout school years
 - Teach skills in all areas of up-to-date technology
 - Mandate public schools to offer courses in the expressive arts, and to offer applied learning opportunities
 - Strengthen pre-school programming
 - Provide opportunities for students who fall short of or exceed performance standards
 - Develop and implement a safe schools program

² Theme 2 includes Goals and Actions derived from the Goals, Objectives, and/or Actions of the following WGs: Educational Excellence and Sense of Community.

- Develop and implement a comprehensive support services program, including workshops on health and well-being, stress management, and self-assessment
- Maintain, improve and promote opportunities for physical recreation
- Address issues of diversity through professional development opportunities, in the curriculum, and during classroom time.
- Provide sufficient funding for educational and learning opportunities
 - Provide quality childcare, including extended daycare, at break-even cost
 - Develop and implement a capital improvement and maintenance program
 - Eliminate cost as an obstacle in not offering a desired aspect of physical education
- Develop and implement a town-run partnership program to promote the concept of community partnerships with all education and learning facilities (with business involvement, intergenerational learning, all governing bodies, students, families)
 - Develop and implement mentoring programs: teacher-to-teacher; student-to-teacher; elders to youth; youth to elders
 - Educate town in the concept of “youth as resources”
 - Develop and implement a program addressing health and well-being for all family members, including students
- Develop and implement an ongoing evaluation process for all systems associated with life-long learning
 - Involve students in the evaluation process
 - Develop and implement a committee to monitor the ongoing process
 - Develop and implement a performance-based testing process for students

Theme 3: Sustain and Enhance Physical Character, and the Larger Environment³

Lexington has a strong sense of tradition, historic preservation, and land conservation. Even though many decades of metropolitan growth have exacerbated problems related to traffic, noise, air and water quality, and housing costs, the town has maintained much of its historic character and small town scale.

Given Lexington’s current zoning regulations and physical boundaries, only a limited amount of growth and new development is possible without major changes to the character of the town. Because of these limited opportunities, the type of growth that does occur must be the type that the town really wants and needs.

The WGs recommended the following Goals and accompanying Actions on the theme of the physical character of Lexington and the larger environment:

- Improve traffic and parking conditions in Center

³ Theme 3 includes Goals and Actions derived from the Goals, Objectives, and/or Actions of the following WGs: Managing Growth, Transportation, and Sense of Community.

Section I: Themes, Goals, and Actions for 2020

- Conduct a traffic/parking study re: the need for and location of parking garage
- Adhere to Transportation Demand Management Policy, apply it to existing and new businesses
- Consider satellite parking with shuttles
- Provide appropriate parking for tourist buses – not on the Green
- Increase protected open space
 - Establish Lexington Conservation Foundation
 - Establish local land bank which includes a real estate transfer tax
 - Provide a land management program to protect wetlands, streams, and ponds
 - Establish plans and policies that allocate a proportion of any property being developed to open space
- Preserve and enhance local air quality
 - Encourage the purchase and use of hybrid and/or electric autos via tax credit
 - Convert commercial and public vehicles to low emissions fuels
- Reduce the environmental impact of households and businesses
 - Use permitting mechanisms to require Center businesses to clean up trash, pavement, and surroundings
 - Conduct community programs to encourage conservation and heighten awareness of the use of synthetics and chemicals
 - Implement a “pay-as-you-throw” municipal solid waste disposal program, and continue to monitor and support pay-as-you-use utility rates
- Limit traffic, noise, and pollution from Hanscom Field
 - Require state-of-the-art noise and pollution abatement
 - Require road improvements and environmental coordination
 - Manage Hanscom expansion, in commercial office development, airside issues, and ground access issues
- Increase alternatives to single occupancy vehicles
 - Promote and improve public transportation services: better coordination of and increased number of routes; explore “on-call” taxi service
 - Educate public about bicycling options
 - Provide incentives to parents/students to use alternative modes (bicycle, bus, walking) to get to schools and disincentives to drive (e.g. parking fees at high school)

Theme 4: Reinforce Connections Between Residents, Civic Organizations, and Town Government⁴

Lexington prides itself on its place in history; along with this comes the responsibility of ensuring that the democratic ideal of citizen participation in local affairs is upheld. This

⁴ Theme 4 includes Goals and Actions derived from the Goals, Objectives, and/or Actions of the following WGs: Productive Connections, Fiscal Stability, Sense of Community, and Educational Excellence.

involves encouraging and providing a wide variety of opportunities for all residents to become involved in the initiatives and activities of local organizations and town government. The expectation is that an active and engaged citizenry contributes positively to all aspects of the community.

The WGs recommended the following Goals and accompanying Actions on this theme:

- Expand information dissemination options for civic activities
 - Modernize and update town's information technology systems
 - Expand and make more readily accessible the town Web site, including establishing a person-in-charge; post a meeting calendar with agendas and opportunities for Q & A
 - Establish an (multi-media) information kiosk (could be part of an existing structure)
 - Use the school newspaper and radio station to inform students; use and enhance local newspaper coverage and advertising fliers in bills
- Provide approaches to inspire the uninvolved of all ages to become involved
 - Encourage town meeting members to contact their constituents through local gatherings
 - Disseminate information about/invitations to school activities to all residents, not just those with school-aged children
 - Develop a brochure for residents (new and old) providing an orientation to the town, government, voting, organizations, historical assets, and other items of interest
 - Appoint an ombudsman
- Increase accessibility/availability of government buildings, agencies, officials, materials, and services
 - Include photos of officials in publications, Web site, cable TV, and the libraries
 - Recruit and hire town employees of diverse backgrounds, including the staff of all educational and learning institutions
 - Support a community-endorsed plan for Senior Center requirements
- Encourage increased resident participation in and understanding of the fiscal process
 - Develop and organize multiple mechanisms for citizen involvement in optimizing the receipt of sufficient local, state, and federal funding for town services
 - Have high school students develop a document describing the town's fiscal process
- Promote use of volunteers (including students) and connect them with those needing services
 - Formalize role of volunteer coordinator and publicize the position, the opportunities, and the values of that interaction

Section I: Themes, Goals, and Actions for 2020

Theme 5: Establish Open and Accessible Processes for Town-Wide Decision-Making, Planning, and Conflict Resolution⁵

The Lexington 2020 Vision process has been characterized by increased and focused communication and conversation about a wide range of issues. Follow-up actions will require careful and consistent planning and ultimately, decision-making on the part of residents and town government. If these actions are to be successful, processes for encouraging and formalizing communication – both within the town and outside - must be developed. Conflicts along the way are inevitable. They are a positive indicator that ideas are being shared and discussed.

The WGs recommended the following Goals and accompanying Actions on this theme:

- Enhance and refine the fiscal process to make it useful and accessible
 - Improve the system of fiscal accountability of town government: have departments establish goals for fiscal year to explain and link spending to specific goals and budget line items. Assess if these goals have been met.
 - Identify ways to consolidate government services and operations
 - Create alternative revenue sources to reduce reliance on residential real estate taxes: incubate a pool of talent and knowledge for ideas
 - Ensure that town and affiliated regional entities receive maximum state and federal funding
- Conduct and/or influence long-range studies, policies, and regulations in the areas of fiscal, transportation, technology, and environmental planning
 - Survey Lexington's transportation infrastructure on a regular basis
 - Continue high quality and clearly articulated 5 year plan for fiscal revenues and expenditures
 - Support installation of communications technology infrastructure to encourage "telecommuting" and home businesses
 - Conduct local surveys of environmental quality parameters
- Initiate and/or participate in regional groups to resolve common problems, address common needs, capitalize on common strengths, and share services and resources in the areas of transportation planning, open space, environmental quality/monitoring, and fiscal planning
 - Establish effective agencies and increase effectiveness of existing agencies to manage Hanscom expansion
 - Establish intermodal transport routes connecting Lexington with transport centers
 - Establish and promote a regional planning authority to address the protection of open space

⁵ Theme 5 includes Goals and Actions derived from the Goals, Objectives, and/or Actions of the following WGs: Productive Connections, Fiscal Stability, Managing Growth, Transportation, and Sense of Community.

Section I: Themes, Goals, and Actions for 2020

- Annual fiscal reporting for town and private agencies should include information on regional opportunities and agency actions to promote involvement and usage
- Re-evaluate, through a participatory structure, the 2020 vision and planning processes periodically
 - Re-evaluate success with respect to Goals and Measures every 2 years
 - Survey residents on a regular basis to ensure that the Goals are on-target
 - Rely on 2020-derived “core values” for decision-making
 - Weigh long-term savings and benefits against short-term investment
- Strengthen and support existing democratic processes for town decision-making
 - Encourage existing organizations to discuss town issues and provide feedback to the appropriate entity
 - Use mechanisms for expeditiously resolving conflicts
 - Assure that public hearings and public notices are widely used to provide information and solicit input from residents, and that all town decisions are publicly disclosed and explained

SECTION II: CONNECTIONS: COMMON THEMES AND CONFLICTS/TENSIONS

While the mission of each of the six WGs was to explore and address a focused topic, there were overlaps, common themes, and some conflicts. This overlap is a positive outcome of this effort in that it identifies and highlights the issues and tensions inherent in local planning. Once identified, they can begin to be addressed.

One aspect of the next phase of the Lexington 2020 Vision process will involve examining the ways in which the Goals and Actions from this report can achieve further integration. This will involve making choices and tradeoffs among the various Goals and Actions, as well as identifying where these can reinforce one another to achieve common interests.

The following sub-sections provide an overview of some of the areas of overlap, common themes, and tensions from the Goals and Actions presented in Section I. (The WG reports in Volume II provide further information on this topic.)

Transportation, Growth Management, and Sense of Community

Transportation planning and growth management are closely linked together and highly interdependent. There is a direct correlation between development and the need to move people and goods. As the town seeks an optimal level of growth and development, it also needs to consider how transportation needs will change. These topics can be complementary to one another; for example, creative transportation planning can assist with reducing the impacts of growth. However, just as easily, one can have a direct negative impact on the other as in the case of increased traffic issues due to the permitting of high density and multi-family development near commercial centers. In addition, efforts to enhance the tourist experience in Lexington may have a deleterious impact on traffic issues as well on the character of the town center if they are not well-planned. Again, if additional parking is to be added in the Center, planning for unintended traffic and growth consequences will be essential.

A long-range transportation plan can promote and strengthen the sense of community character in many ways. Increasing alternatives to single occupancy vehicles, and encouraging walking and bicycling as modes of transportation bring people down to “sidewalk level” and encourage face to face interaction. Slower forms of travel allow people to see more of the town and notice things they might miss while driving a car. Reduced traffic in residential areas increases safety and allows adults and children to interact with their neighbors. Improved sidewalks and recreation paths encourage people to use them; the Minuteman Bikeway is a prime example. Making Lexington Center free of congestion and easily accessible encourages “ownership” of the town by its residents and helps to preserve the historic character of the town.

Regional and State Cooperation

Concerns of Lexington are not unlike those of many other towns in the Commonwealth. Many issues cannot be adequately addressed without going beyond the town boundaries.

Section II: Connections: Common Themes and Conflicts/Tensions

For example, Lexington needs support from the state in terms of enabling legislation for zoning by-law changes and for funding of transportation, education, housing, and other needs. It needs cooperation from neighboring towns to address development and to deal with traffic, housing, and environmental issues. Regional support and cooperation will be particularly critical to effectively addressing planning issues concerning the future of Hanscom Field. Any actions taken pertaining to Hanscom – with regard to commercial office development, airside issues, and ground access issues – should be planned in a comprehensive and coherent manner. Decisions should be made with great sensitivity to the larger context and broader impacts.

In return, Lexington needs to contribute to regional and state efforts that not only reinforce its own efforts to maintain and improve the quality of life, but which support the economic and environmental well-being of the metropolitan area of which Lexington is a part.

Civic Participation and Information Dissemination

Each of the WGs identified the need to provide residents with information and opportunities to interact among themselves and with the various entities within town government. For example, such connections could serve to inform residents about ways in which to conserve natural resources at home; use public and alternative modes of transportation; participate in town and civic meetings, and get involved with a variety of volunteer opportunities.

While Lexington benefits from considerable citizen involvement, there is much that can be done to enhance the civic involvement of the majority who do not participate. WGs suggest organizing neighborhood organizations; linking residents with their town meeting members; and creating interactive communications on the Internet. Capitalizing on school-family-student interactions and encouraging community partnerships is also suggested.

Civic participation increases residents' sense of understanding, belonging, and control over their circumstances. This would be especially important with respect to the town's fiscal process. Moreover, it might be possible for residents and local government to find themselves, together, establishing processes whereby they could address the potentially divisive issues that arise. Such issues include school funding, providing diverse housing options, and managing growth. If residents could be more involved and government could increase its accessibility in participatory decision-making processes, there is increased potential for mutual understanding and conflict resolution. Of course, this all contributes to a greater sense of community and serves to strengthen community character as well.

Fiscal Decision-Making

Perhaps the overriding consideration in any strategic plan is how to fund it. The WGs, as part of their mission and vision, were to work under the assumption of unlimited resources. Of course, when the plan is implemented, financial factors may become the determining ones. The WGs were instructed to consider their visions and goals initially

Section II: Connections: Common Themes and Conflicts/Tensions

to decide what they would like them to be, rather than deliberately constrain their visions. However, financial issues are perhaps the ones to which all conflicts and tensions ultimately boil down. While the WGs worked to identify actions that could be accomplished with no cost to the town, the majority of recommended actions involve at least some financial expenditure. Education is the area to which the town currently allocates a majority of its revenues. Clearly, complex funding decisions lie ahead.

Acknowledgment of Different Viewpoints

Throughout the visioning and planning process carried out by the WGs and the CPG, there was understandably a wide range of viewpoints to be addressed and accommodated. It is a credit to the participants that they handled this process of consensus-building so masterfully. While many differences were resolved through accommodation of interests in the reports, there remain several questions and issues for discussion. Some of these are listed below.

- The Managing Growth WG asked how one finds the balance point of the concept of managing growth. While a zero-growth policy was not a real choice or a desirable option for the town, some group members supported it. The group did not feel at all comfortable calling itself “pro-development” either. They state that it is with “guarded optimism” that they embrace the idea of managed growth. Their support for new development is limited and conditional.
- The Transportation WG found the issue of parking to be particularly controversial. It was difficult for them to agree on how much parking is enough and how much is too little. For example, if more parking is built then it will attract more cars. If parking decreases, more people will be forced to seek alternatives.
- The Fiscal Stability WG faced difficulty defining and agreeing on what “managing fiscal stability” meant. For some, it meant no overrides and for others it meant spending what is necessary to provide services.

SECTION III: PURPOSE, HISTORY AND PROCESS

The Lexington 2020 Vision Process is a town-wide effort to use “20/20 Vision” to empower residents to help determine what Lexington will look like in the year 2020. The process is a comprehensive, community-wide, long-range, public visioning and planning effort.

The Lexington 2020 Vision Steering Committee was created by the Lexington Board of Selectmen, in consultation with the School Committee and the Planning Board, to design and undertake this community visioning and strategic planning process. The Steering Committee guides and manages the Lexington 2020 process on behalf of the community. Its responsibilities include mobilizing necessary resources in support of the process; organizing and supporting stakeholder subcommittees; and coordinating communication with participants and the community at-large.

This strategic planning effort builds on a long and important history of past initiatives. These initiatives - focus groups, community conversations, and a survey - were crucial building blocks for future planning efforts. Nearly seven years ago, the town’s Strategic Planning and Implementation Group (SPAIG), with the support of the Board of Selectmen, set out to gather public input on the core values, long-term goals, and program priorities appropriate for Lexington in the 1990s. The group had no expectations concerning the outcome of this public process; it was envisioned as an experiment and a beginning point in identifying community values and priorities. In total, about 300 people attended one or more of the community conversation meetings. One outcome of the process was that SPAIG identified four Core Values for the town. They were: Quality Education; Public Safety; Open Space; and Affordability.

At the time these activities were conducted, the town had not developed a mechanism to take strategic planning beyond these early stages. These activities constituted the background for the more sustained and comprehensive undertaking represented by the 2020 Process.

Strategic Planning Overview

Conventional planning typically tries to find successful ways to combine resources to accomplish stated goals. Its limitation is that it often does not adequately reflect the full range of changes, both in the outside world and within the entity that is doing the planning.

Strategic planning takes a more dynamic approach, recognizing that the entity does not operate in a vacuum. Moreover, strategic planning does not take the organization’s goals as a given but rather reassesses and seeks to refine and clarify goals, along with identifying the ways to further those goals. Strategic planning can help a town make sound long-term decisions about a wide range of issues that reflect not only where the world is, but where we think it is going. A strategic plan can be a very effective tool for managing municipal change in a complex world.

Section III: Purpose, History and Process

The Steering Committee envisioned a strategic planning process that, on a sustained basis, would engage a wide spectrum of the community in an organized series of discussions to create and implement a vision of the town's future. The vision should emphasize that what one does today affects the future. The strategic plan should be well-grounded in shared goals and clarity of purpose about the key issues affecting the town. The Steering Committee believes that the strategic plan should be helpful in creating a framework that establishes strategic planning as a regular civic activity, to enhance municipal decision-making now and in the future.

The Initiating Committee

In 1998, the Board of Selectmen, in consultation with the School Committee and the Planning Board, appointed an 11-member Initiating Committee for a Strategic Goal-Setting Process. (The Initiating Committee later evolved into the Steering Committee.) The Initiating Committee members were to consist of a combination of community leaders from the following categories: Board of Selectmen, School Committee, Planning Board, Long Range Planning Committee, Town Meeting Members, Clergy, and individuals within the community not actively engaged in the governance of the community but with skills and experiences that had the potential of adding value to the strategic planning process.

The charge of the Initiating Committee was to review past planning efforts and incorporate them, as necessary, to develop the foundation for a community-based strategic goal-setting process. There were four basic objectives to the charge:

1. To develop a work plan and present public progress reports;
2. To frame and provide context to the strategic planning effort, including the preliminary identification of the key planning components and issues to be explored and analyzed;
3. To develop criteria and process for selecting members of the Steering Committee and Stakeholders Group; and
4. To develop the methodology for the strategic planning process, and a detailed step-by-step description of the process for presentation to the elected town Boards (Selectmen, School, and Planning).

To accomplish its charge, the Initiating Committee organized into two subcommittees: the Citizen Participation Subcommittee and the Process Design Subcommittee.

The Initiating Committee was guided in its efforts by "The Community Visioning and Strategic Planning Handbook" of the National Civic League. This handbook discusses the benefits of community-based, collaborative processes for goal-setting and problem-solving. And, while there is no "correct" way to do this, there are important steps in carrying out such a process, including conducting outreach, creating a vision, developing task forces, identifying goals, and implementing those goals. The handbook also provides examples of the different approaches that several communities in the United States have used to conduct successful visioning and strategic planning efforts.

Section III: Purpose, History and Process

The work of the Initiating Committee resulted in the name given to the process: Lexington 2020 Vision. The Initiating Committee made decisions and recommendations concerning recruitment and public communication strategies; process design; project management; and consultant services needed. The Initiating Committee agreed to create two layers of visioning groups: the Stakeholders Group and the Expert Subcommittees. These groups were not to be developed and formed until later in the process.

The Initiating Committee also developed a letter and recruitment questionnaire for a January 1999 mailing that was sent to all Lexington residents. The purpose of the mailing was to inform residents of the strategic planning efforts underway and of plans to form the two layers of visioning groups. Recipients were asked to indicate their interest in participating in the process. The Initiating Committee received and compiled responses from 231 stakeholders.

Finally, the Initiating Committee recommended that it be reconstituted as the Steering Committee for the Lexington 2020 Vision process. Membership would be composed of the Initiating Committee members and 3 to 5 additional people who represented Lexington's business and other interests. The basic charge to the Steering Committee was to "make the process work."

The Steering Committee

The Steering Committee commenced its work in the Spring of 1999 and has met about every two weeks since then. As with the Initiating Committee, a serious effort was made to recruit members from a variety of backgrounds and those who were previously uninvolved in local organizations, as well as those representing a variety of Lexington organizations and Boards. Three Subcommittees were formed: the Operations Subcommittee; the Participants Subcommittee; and the Public Communications Subcommittee.

The Operations Subcommittee carried over from the "Process Design" subcommittee of the Initiating Committee. It has served primarily to work with the town's project management staff to oversee and implement the Steering Committee directives in accordance with the overall plan. Similarly, this Subcommittee serves to frame some of the key issues to be brought before the Steering Committee for general discussion.

The Participants Subcommittee carried over from the Stakeholders Subcommittee of the Initiating Committee. Its chief focus was to identify and ensure that the pool of volunteer participants for various groups was representative of the town.

The Public Communications Subcommittee developed specific plans and communication vehicles for keeping the general public informed of the activities and progress of the process. It provides materials for print media, cable, the Web site, and other communications instruments. It seeks to maintain a timely and consistent information profile with the Lexington public to ensure an open and transparent process.

Section III: Purpose, History and Process

With a process plan, structure, and subcommittees in place, the Steering Committee worked on the specific details of how events and actions would be carried out, step-by-step throughout the remainder of 1999 and to-date. The Steering Committee was guided and bound by the overall structure of the process but remained flexible enough to adjust its approach based on what was timely and necessary. The Steering Committee reports to the elected Boards on an as-needed basis.

Lexington 2020 Process and Activities

What follows is a brief description of the activities conducted as part of the Lexington 2020 Vision Process.

June 1999 Workshops

To launch the public process for development of a vision and strategic plan for the Town, the Steering Committee held a series of four public workshops where over 120 residents provided input on values and issues for Lexington. Their participation provided the Steering Committee with a strong foundation for the next phase of the visioning process.

Each of the workshops sessions focused on sampling the opinions and thoughts of residents on two key ingredients of strategic planning: 1) the key values shared by many residents; and 2) the important issues and concerns of today that may help to shape the Lexington of tomorrow.

When asked what they valued about Lexington, participants responded that the schools are excellent, the town is well-managed, and the population is community oriented, resourceful, diverse, and highly educated. The visual attractiveness of the natural and built environment, the vitality of Lexington Center, good location and transportation, and historical resources are also valued.

Participants identified significant issues for the Town's future quality of life:

- Social Diversity;
- Affordability;
- Infrastructure, Schools and Services;
- Conflicts and Divisiveness;
- Physical Character and the Environment; and
- Fiscal Resources and Spending Priorities.

October 1999 Fall Forum

The purpose of the Fall Forum was to focus once again on previously identified topics, derived from community input, and begin to envision the future. Six topical areas were developed based on information gathered at the June 1999 workshops. The Steering Committee tentatively framed these topics as general areas of focus for strategic planning. For the integrity of the process, the Steering Committee wanted to further test and explore a deeper understanding of whether they were going in the right direction with these topics. The Steering Committee planned to use the input received to further refine these topics into strategic agendas for future Work Groups.

Section III: Purpose, History and Process

Sixty-two people attended the afternoon event; 30 of these 62 people were new to the process and the remaining 32 had previously participated in one of the June 1999 workshops. The resultant six topics presented for discussion and consideration were:

- Social Character/Sense of Community
- Educational Quality/Opportunity/Institutions
- Physical Character: Residential, Commercial, and Open Space
- Town Management and Public Services
- Accessibility/Transportation/Regional Role
- Citizen Input/Governance/Openness

The format was for participants to browse through a “thought mall” where an informative display was presented for each of the six categories of issues and residents were encouraged to provide written comments, thoughts, and feedback. Then, these topics and issues were discussed in breakout groups; and at the end of the forum, participants reported back and shared their comments with the full group of participants.

Establishing Work Group Topics, and Developing Missions and Structure

The results of the Fall Forum indicated that the six topics that had been presented were basically on the right track. The two topics entitled, “Town Management and Public Services” and “Citizen Input/Governance/Openness,” were combined. A new topic was added to address the financial implications and fiscal processes associated with providing town services. Additional questions and issues were identified and put “on the table” for the consideration of those residents who volunteered to participate further.

The six WG topics formulated were:

- Fostering a Sense of Community
- Educational Excellence
- Managing Growth: Development and Open Space
- Ensuring Productive Connections Between Citizens and Town Government
- Transportation
- Managing Fiscal Stability

During November and December 1999, the Steering Committee worked on developing a broad mission for the WGs (formerly referred to as the Expert Subcommittees). It stated that:

The mission for each Work Group (WG) is to develop a Lexington 2020 Vision for its specific topic and then, develop Goals, Actions, Objectives, Measures of Success, and address Resource needs for its specific topic. Each WG is to develop a Draft Report for incorporation into a comprehensive Draft Vision Plan that will include the reports of all WGs.

The Steering Committee also worked on developing a mission for the CPG effort (formerly referred to as the Stakeholders Group). It stated that:

Section III: Purpose, History and Process

The mission of the Core Participants Group (CPG) is to act as a sounding board, focusing and integration agent, and “big picture” editor during the Lexington 2020 Vision Process. The CPG is a crucial vehicle for bringing a broad, community-wide perspective to the development of a town-wide Vision and Plan. The CPG is to ensure that, at each step along the way, the work undertaken as part of the 2020 process is reflective of the Lexington community as a whole and not perceived as representing special interests.

Identifying and Recruiting Participants, and Public Communication and Outreach Efforts

The Steering Committee made repeated and deliberate efforts to reach out to all Lexington residents in seeking participants for the Lexington 2020 Vision process. It was the hope of the Steering Committee that the process would attract and engage those Lexington residents who had not been previously active in civic affairs. It was imperative that participants be representative of the range of interests, affiliations, and backgrounds present in Lexington. It was also imperative that the process for identifying and recruiting participants be open and available to all.

It was of the utmost importance to the overall success of the 2020 Vision process to identify and recruit balanced and well-represented groups of participants for the WGs and CPG, which each had different missions. The Steering Committee developed criteria for selecting a mix of participants for the groups; these were: representation; balance of viewpoints; mix of skills; basic level of understanding; expectation of good faith participation; and adequate time availability and commitment.

The Steering Committee sent an open invitation letter in November 1999 to those who had responded to the January 1999 questionnaire. It was also sent to others who had attended Lexington 2020 Vision events, to civic organizations, and to the local newspaper. The open invitation letter included descriptions of the six WG topics, a summary of the WG mission, and a brief description of the CPG. The letter requested volunteers to commit to a role, either WG or CPG, which seemed most attractive and convenient. A separate invitation letter was also sent to high school students. The Steering Committee followed up with telephone calls to identify each person’s preferred role.

By early December 1999, six groups of between 10 and 20 residents had been identified for the WGs.

For the CPG, the Steering Committee agreed that it wanted between 35 and 50 members to participate in each CPG meeting. Assuming that not every member would attend all meetings, the Steering Committee agreed that a total of 60 to 75 people should be members of the CPG. Because the earlier mailing had not yielded as many CPG volunteers to ensure a “core” group of the desired size, another letter was sent out to about 100 residents inviting them to join the group. These additional residents were identified from a database of survey respondents plus those who had attended the June and October forums. The Steering Committee followed up with phone calls and ended

up with a list of 47 CPG members. There were 34 residents participating regularly in the CPG.

As the process unfolded, all residents who expressed an interest in participating were able to participate. New participants joined the CPG as this was the more appropriate forum to join in mid-process. Throughout the process, the “door was open” for any interested resident to join. Sometimes participants saw a person at a CPG meeting once and not again, and other times, there were many familiar faces at meetings. The Steering Committee and CPG members expressed concern that there were not more residents choosing to participate in the CPG; they wanted the CPG to be more representative of the overall demographics of the town. CPG members were encouraged to invite others to attend the meetings.

Throughout the 2020 Vision process, the Public Communications Subcommittee, on behalf of the full Steering Committee, conducted a public communications effort. This was done in the interest of keeping the public apprised of the 2020 Vision process and to actively encourage citizen participation at all events and meetings. Written information was mailed on a regular basis to over 100 community organizations and over 200 Lexington residents who had expressed an interest in the process. Public materials and resources included: placement of items in the Lexington *Minuteman*; appearances of participants in the process on Lexington’s local access channel on cable TV; creating and maintaining a resource notebook at Cary Library; mailings to interested stakeholders; and initiation and maintenance of a Web site.

A listing of WG and CPG members, as well as other participants in the process, is provided in Volume II of this report.

WG and CPG Orientations

With the WGs and CPG formed in January 2000, the Steering Committee conducted an orientation for each group to describe the specifics of how it would conduct its mission. The overall roles and responsibilities of the two groups and how they compare are outlined in Exhibit 1 at the end of this subsection.

For the WGs, detailed step-by-step written guidance was distributed, deadlines explained, and support personnel introduced. A copy of the WG guidance and a copy of the CPG guidance is provided in Volume II.

In addition to town government staff, who were to be available to each WG as technical and informational resources, two Steering Committee members or liaisons were also assigned to each group as resources on the broader 2020 Vision project. The Liaisons were to assist the WG in getting the process going but were to work themselves out of any administrative and logistical roles. Their role was to be a resource when the group needed direction, to keep in touch with what the WGs were doing, and report significant process issues back to the full Steering Committee.

Section III: Purpose, History and Process

In addition, because each WG was required to meet the requirements of open meeting laws, meeting postings and minutes were made available. All meetings were open to the public. WGs handled their own administrative and clerical functions. Meeting postings were typically made in writing to the Town Clerk. Meeting minutes were often publicized by posting them directly to the town Web site and providing “hard copy” to the Town Clerk’s office.

The CPG orientation provided members with the information that the group would function primarily as a discussion forum and conduct its responsibilities at group meetings. The 2020 Vision Steering Committee served as the Executive Committee of the CPG.

One key element of the CPG’s operation was to provide constructive feedback to each WG as it reached its milestones and submitted its specific documents. The CPG would review, discuss, and provide feedback on the WG products. CPG comments on specific documents would be communicated to the WGs by means of a Summary of Notes prepared by a CPG member in attendance, as well as by notes taken by a WG representative present at the meeting.

It was explained that CPG members were expected to use their position on the CPG to serve as information conduits to and from the larger community. They were highly encouraged to solicit input from their fellow residents on the overall 2020 process and on specific topics and issues under consideration. They were also encouraged to provide ongoing information to their neighbors, friends, colleagues, and others, through informal means, about the 2020 process and activities underway

All WG and CPG members were reminded that a welcoming climate continuously open to input was important for future acceptance and support of the 2020 Vision by the community at-large. Early on in their efforts and with the support of the Steering Committee, several WGs added new members; this was done in an effort to expand on the diversity of perspectives within the groups. The new participants included a number of high school students.

Exhibit 1

**Comparison/Integration of
Core Participant Group and Work Group Roles
In Creating Lexington 2020 Vision**

Core Participants Group

- To be responsible for representing the full breadth of views in the community
- To be responsible for drafting an initial general framework for a vision of the character and identity of Lexington in 2020
- To review products from all six Work Groups, with ability to note overlap, conflicts, and gaps
- To provide comment and feedback (as the broader community will in the future) on the Work Group products

Work Groups

- Membership not necessarily representative of entire community
- Responsible for developing detailed Vision for one specific topic, which is a sub-element of the eventual 2020 vision
- To use the CPG comments on Work Group products to help improve the acceptability of the products to the town at large

The CPG and Work Groups operated on parallel tracks; both efforts were needed to create a coherent and viable vision. The Work Groups provided expertise in one sub-topic of the vision, and the CPG provided an initial framework for a town-wide vision, as well as community reaction to Work Group ideas. By working in parallel, the process was designed to stay on track, both for feasibility and acceptability down the road.

The CPG and the Work Groups needed to communicate and collaborate throughout the entire 2020 vision process. Both groups shared the job of creating a vision that would be acceptable to the town as a whole.

Section III: Purpose, History and Process

Environmental Scan Process

To assist the WGs in beginning to consider and discuss their topics, the Steering Committee compiled a list of questions for each topic based on information gathered from the June workshops and the Fall Forum. These lists of questions are included in the WG guidance document provided in Volume II of this report.

Each WG began its efforts by discussing the questions for its specific topic, identifying additional questions or issues, identifying relevant stakeholders and their key issues, reviewing the current status of the topic, and identifying the additional information needed to address the issues. Each WG also examined the existing information available from WG members, town officials, previous 2020 project materials, and other sources.

In order to make sure that the Visions, Goals, and Actions for 2020 took current conditions into account, each WG was asked to develop an Environmental Scan for its topic. The Environmental Scan document was to include the current status of the topic; resident needs and preferences as expressed in previous project forums; predictable future demographic, economic, political, technological, and other trends; uncertainties; and tough questions that the WG should take into account in its discussions.

The purpose of the Environmental Scan was to identify and describe, to the extent possible, the external forces, pressures, and trends that, both currently and in the future, are likely to impact and have an effect on the issue of interest. The Environmental Scan document was to form the basis for and assist the WGs in their next step - the development of Visions for the year 2020.

To complement the WGs' efforts on the Environmental Scan, the Steering Committee organized a "Futures Forum" for the community in February 2000. The forum focused on how Lexington might be affected by global and national trends and forecasts for the next few decades. Three experts in future issues participated in a panel that was attended by over 100 citizens. Nariman Behraves, Chief International Economist and Research Director for Standard and Poor's DRI; Philip Herr, Planning Professor at MIT; and Christopher Meyer, a Partner at Ernst and Young's Center for Business Innovation, spoke about Massachusetts' and Lexington's integration into the future economy and regulatory arena. Further information on The Futures Forum is provided in Volume II of this report.

In early March 2000, the WGs submitted the first draft of their Environmental Scans to the Steering Committee. The Environmental Scan reports prepared by each of the six WGs are presented in Volume II of this report.

Vision Development

The WGs then proceeded to develop a draft Lexington 2020 Vision for their individual topic areas. A Vision is an expression of possibility, based in reality yet far enough of a "stretch" that people are inspired to help make it happen despite the challenge and uncertain prospects for success. A Vision provides the basis from which the community determines priorities and establishes targets for performance. It sets the stage for what is desired in the broadest sense. It should be based upon the collective values and beliefs of

Section III: Purpose, History and Process

the members of the community. It should represent the best projections of the future and what that future means to the community. It assumes that all the resources required to implement the vision can be secured.

The Visions prepared by the WGs took as their starting point the current situation, as identified in the Environmental Scans, of each of the six specific WG topics.

Only after a clear vision is established is it feasible to effectively begin the difficult work of outlining and developing a clear plan of action. The Vision Statement drives the goals of the topical area.

The CPG met in early March 2000 to participate in a visioning exercise of its own. The information generated from this group brainstorming effort was used to develop a first draft of a town-wide vision. The vision was an overall one, not an issue-specific vision like those the WGs had been asked to develop. The CPG vision did not attempt to integrate, incorporate, or reconcile specific components of the visions developed by the WGs. At an early April meeting, the CPG reviewed and revised its draft town-wide Vision. Again, in early June 2000, the CPG made minor edits to its town-wide Vision.

The CPG's town-wide Vision and the topic-specific Visions developed by each of the 6 WGs are included in Section IV of this report.

Formulation of Goals and Actions

By mid-Spring 2000, the WGs began working to develop a detailed set of Goals for their topic areas, with a corresponding set of Actions, Objectives, and Measures of Success. This information was to be presented for ease of reading in matrix form, with Actions prioritized. This portion of the WG effort was the most time consuming and important; it represented the recommendations that the WG would make to the town on its topic.

During this period of time, the WG Chairs attended a Steering Committee meeting to report on the status of their work and to share questions, issues, and concerns with the Steering Committee.

Public Outreach Activities

All WGs were required to conduct a public outreach activity; in mid-Spring 2000, they began to plan for these activities. The purpose of the public outreach at this point in the process was small-scale testing and touching base with relevant constituencies so that opinions could be heard. This was clearly just the start of much "public testing." The goal of the outreach activity was to get public reaction to and comments on what the WGs had prepared and were considering to-date. The goal was not to gather more substantive research data. The WGs were to test their initial Visions, and Goals and associated items with the members of the public who would be helpful in evaluating the ideas.

Section III: Purpose, History and Process

WG representatives made presentations to the CPG on their planned public outreach activities. The CPG provided feedback and offers of assistance, where appropriate. The CPG generated a list of public outreach forums that WGs might consider using.

WGs conducted their public outreach activities in April and early May; they included: conducting an informal public meeting; placing newspaper articles; distributing questionnaires; and conducting informal interviews with key stakeholders.

Review and Coordination Between Groups

In late March 2000, the CPG met to review the Environmental Scans prepared by the WGs. WG representatives were present at the meeting to receive the comments, answer questions, and clarify issues. WGs then reviewed CPG comments on their Environmental Scans and made revisions as needed.

In mid-May, all WGs submitted their preliminary Visions and Goal Matrices to the Steering Committee. Then, all six WGs met together to share and review each other's documents. Following this, WGs incorporated comments, revised and refined their reports, and submitted draft reports to the Steering Committee.

In late May and early June, the CPG met to review all of the WG reports, and provide comments to WG representatives. Prior to submitting their "final" reports to the Steering Committee, the WGs incorporated/acknowledged CPG comments and put finishing touches on their reports. WG reports were submitted to the Steering Committee on June 12, 2000.

Wrap-Up and Evaluation of this Phase of the Process

On June 22, 2000, a celebration was held for all those who participated in the WGs or CPG during the year. This was an opportunity for the Steering Committee to formally thank the participants, distribute evaluations, and wrap up this phase of the 2020 Vision process. At this meeting, the Steering Committee described its initial plans for the next steps in the process.

About 50 participants were in attendance at this meeting, including town staff and Steering Committee members. The people who attended were invested in the process and asked questions indicating their continued interest in the process. Questions included: What will be the review process for the report? How can we link 2020 Vision to the work of existing town Boards and committees? Who will update and measure progress?

An analysis of the 37 evaluation forms that were returned (25 from WG members representing five WGs and 12 from CPG members) indicated the following:

- WG members felt that their topics were relevant and manageable and their mission was clear. They felt that connections with the Steering Committee and town staff were adequate. The WG members were less than happy with connections with the CPG and with other WGs. The primary complaint about the CPG was that CPG

Section III: Purpose, History and Process

feedback on WG documents was too delayed. Twenty of the 25 WG respondents said they will definitely continue to be involved with the Lexington 2020 Vision process, four said “maybe,” and only one said “no.”

- CPG respondents generally felt that they were successful as a sounding board, that their Vision statement represented the view of the whole community, and that the WGs addressed their concerns. Eight of the 12 CPG respondents said they will continue to participate in Lexington 2020 Vision, three said “maybe,” and only one said “no.”

Compilation, Integration, and Summary of WG Reports

Once all six of the WG reports had been submitted to the Steering Committee, they needed to be organized in a comprehensive and manageable manner that would enable the public to read and react to them. The Steering Committee had been considering a variety of approaches to doing this throughout the year. Initially, it had stated that the WGs and the CPG would jointly develop a process for coordinating all reports into one summary document. As the 2020 process unfolded, the Steering Committee decided that it would propose an approach and ask the WGs and the CPG to provide comments on it. This was done. The Steering Committee, which was charged with the responsibility for the final decision regarding the process for the development of the summary report, then proceeded to prepare a draft of this report.

In Fall 2000, the Steering Committee held a public comment period on the draft report. Two public meetings were held, one in October and one in November, as part of the public comment period. At the discretion of the Steering Committee, some comments received have been incorporated into this report. A complete copy of all written and oral comments from the comment period are presented in Volume II of this report.

Next Steps

The next phase of the Lexington 2020 Vision process will involve presenting the information from the “Status Report of the Planning Process” through a variety of means to all residents, civic and community organizations, town meeting members, town Boards and committees, and town government staff for discussion and feedback. The Steering Committee hopes that by so doing, it will encourage reflection on the issues and discussion on a wide range of views.

This report will serve as a guide for the town as it develops an approach to implementing Lexington’s goals and actions for the future. The Steering Committee expects that this process of visioning, community dialogues, and discussion will be ongoing, engaging, and fruitful.

SECTION IV: THE VISIONS

Both the CPG and the WGs developed Vision Statements as part of their missions. These groups were advised to consider a Vision as an expression of possibility, based in reality yet far enough of a “stretch” that people are inspired to help make it happen despite the challenge and uncertain prospects for success.

The CPG developed one town-wide Vision and each of the six WGs developed a Vision for its specific topic area. The Visions do not represent where Lexington is now, nor necessarily where the town is currently heading. Instead, the Visions describe where each WG thought the town should head in its specific topic area. Achieving each of these Visions, as they are written, is unlikely as several have conflicting elements. They serve, nonetheless, to inspire thought and action for Lexington’s future.

The Visions, presented below, are meant to describe a desired future in Lexington.

CPG Town-Wide Vision Statement

(Written as in the year 2020)

The Town of Lexington prides itself on being a great place to live. Residents and visitors alike characterize it as a vibrant and active community, which places a high value on learning at all ages. Its residents and employees welcome the diversity of people who are attracted to Lexington and choose to call it their home and/or place of employment.

Lexington is, and will stay, a primarily residential community with a tradition of offering quality, broad-reaching municipal services. It is committed to preserving and maintaining a sense of community that includes its historic tradition, its public and private open spaces, and its public support for civic life. It strives, however, to maintain a range of affordability. Residents recognize that these qualities are always difficult to balance.

An open and structured process of community conversation and long-term planning help the town remain forward-looking. Major elements, which are consistently addressed and evaluated, include: fiscal responsibility; sustainability of natural and human resources; transportation issues; education; and regional cooperation and integration. Residents are invested in and rely on this process as they reconcile competing needs and interests.

**Vision Statement:
Fostering a Sense of Community**

The historic character of Lexington, the high level of technical education of its residents, and the high standard of education for its children form a framework and background for a vision of the town in 2020. This vision retains the strengths of today's strong school support and highly valued residential neighborhoods of families with school-age children and older adults. It seeks to build strengths in communication within the community, attractions for younger citizens, and availability of housing options over the full life cycle. In this vision, we:

Appreciate History

- Preservation and celebration of historic town assets, including local events and interest points as well as Lexington's national attractions
- Extensive use of the Internet and other electronic media for preservation of, and access to, local historic information

Respect Diversity

- Personal and electronically mediated interactions to discuss and resolve issues at the regional and town levels
- Greater sensitivity to, and discussion of, differences in age, religion, lifestyles, sexual orientation, and ethnicity
- Pro-active welcoming and communication forums for new and old residents to achieve a sense of belonging, including all racial, ethnic, and faith communities and lifestyles
- Different ranges of housing options in different sections of the town and region, to accommodate varying family sizes and life-cycle stages

Encourage Volunteerism

- A high level of volunteerism, encouraged by public recognition, extending to town government, local neighborhoods, senior and youth support, and inter-cultural interactions
- Strong mutual support within neighborhoods, neighbor knowing and trusting neighbor

Support Human Services

- Providing targeted services for segments of the community, such as social opportunities for teens and young adults, childcare for young families, transportation for non-drivers, and services for the elderly
- Regional as well as local planning and integration of human services, transportation, and environmental factors

Strengthen Community Character

- Effective planning of facilities and encouragement of businesses to provide the range of services and parking for both tourists and residents
- Zoning protection for the character of local neighborhoods, while encouraging diverse options for living, shopping, and working in a "whole community"
- Balancing the tax burden with the benefits provided, so that taxpayers of differing life styles generally feel they receive good value for their contribution
- Traffic routing and multiple access and transport modes to achieve a pleasant town center experience while providing transport into and around it
- A self-sustaining pride in the town and its appearance and quality of life

This vision achieves the preservation of the highly valued quality of the town today, while moderating the imbalances of demographics, and easing the frictions between diverse groups in Lexington. It broadens the appeal of the town while maintaining its character and economic value. It enhances the experience of living in town while fairly balancing the costs of services. Our vision of Lexington in 2020 makes it a thriving community in which we and our children will be happy and proud to live.

Section IV: The Visions

Vision Statement: Educational Excellence *(Written as in the year 2020)*

The quality and diversity of educational opportunity and life-long learning in Lexington is a hallmark of the Town. The range of services addresses needs from early childhood through senior adulthood with the public school system as the principal provider supplemented by other public and private agencies.

From pre-school through high school, the Lexington education environment is one that is safe and that cherishes the individual. Support for education is inter-generational: there is concern among seniors for the well being of youth and families, and community-wide support for adult learning. Schools and families work together to develop each student's individuality, potential, and capacity for growth and learning. Lexington values creativity and self-actualization, critical thinking, and the ability to work independently as well as collaboratively. The curriculum and programs of the schools stress social as well as intellectual competency. Graduates of Lexington schools have an appreciation of learning as a lifelong skill.

The resources available – personnel, physical facilities, technology access, community connectivity and support, and continuous planning, review, and evaluation – are appropriate to the educational mission.

Beyond the formal educational system, Lexington offers a wide range of opportunities through schools, libraries, cultural, religious, and recreational organizations, all aimed at continuing to stimulate and develop members of the community throughout their lifetimes.

Vision Statement:
Managing Growth: Development and Open Space
(Written as in the year 2020)

Lexington of 2020 is a people-centered residential community in which the physical character of the town enhances the quality of life for all its residents. Our town provides an environment that is healthy, enjoyable, and enriching. We respect and appreciate diversity of all types, and provide for people of varied income levels and ages. Our intent is that our leafy, historic and inviting small town character be preserved and enhanced for generations to come.

Our coherent neighborhoods, while diverse in both residential and physical character, all provide inviting amenities and opportunities. Traffic, noise, pollution and overcrowding are elements which we reject. Easy and safe access to open and natural areas, pleasurable scenery, walking and cycling, solitude and social interaction are both common and highly valued.

Work and business opportunities in the town are encouraged. The people of the town have ample opportunity to offer their intellectual skills from their homes or from business settings that are compatible with Lexington's character. We strive to enhance and balance that character with consideration of new technology and ideas.

We recognize that, with limited space and resources, many types of growth will be detrimental to our quality of life. Lexington's historic places, gracious old homes, farmland and open spaces, and diverse neighborhoods are effectively protected by zoning laws and other policy. We limit and direct growth through replenishment and refinement rather than through mere expansion.

Our town continues to plan thoughtfully for the future. We adapt to society's transformations while realizing that we need not adopt all such trends. We recognize our role in living a sustainable lifestyle, both as an individual and as a global community. We continue to lessen our dependence upon fossil fuels, decrease our use of toxic chemicals and natural resources, and explore ways of achieving a stable population. We do this locally and through fruitful collaboration with our neighbors in nearby towns and throughout the region in efforts to protect our common environment.

We in Lexington believe that the future is to be selected, not predicted. We thank our past active citizens and town employees for their concern and their foresight. We greet the future with confidence, enthusiasm, and a continuation of our caring tradition.

Section IV: The Visions

Vision Statement: Ensuring Productive Connections Between Citizens and Town Government (Written as in the year 2020)

Lexington is a town in which Town officials make informed policy decisions based upon knowing and having access to the pulse of the community. In turn, Lexington citizens have the information necessary to voice informed opinions to Town officials. We the people know how to communicate these informed opinions to the right people at the right time and in the right way. There are an expanded number of ways that citizens and town can connect with each other; those connections are high quality, efficient and easy to use. Every person has access to the town from anywhere at anytime. Citizens learn about and know how to use the resources that are provided; and they are aware of governmental and group activities to the extent that they want at any given time.

Ways are provided for these connections to be continually updated as the times change and as technology progresses. Modifying the way the Town and its citizens connect ensures that our connections continue to be as effective as possible. That guarantees that healthy communications are maintained for years to come.

**Vision Statement:
Transportation**
(Written as in the year 2020)

The Lexington transportation system of 2020 provides for the efficient movement of people and goods in a manner that supports the desirable quality of life in the town.

- A variety of transportation modes are available, promoted, and utilized; adequate parking exists for all modes. The transportation systems are coordinated within Lexington and between Lexington and surrounding towns.
- Lexington has become a bike- and pedestrian-friendly town. The infrastructure plan for reconstruction and maintenance has brought existing streets and sidewalks up to satisfactory levels of safety and convenience, and has enhanced the network of bikeways and sidewalks. The result is that schools, recreation facilities, the town center and other retail areas, and places of employment are safe and convenient for people to reach by ways other than by single-occupant automobiles.
- Adequate satellite parking, incentives for car and van pooling for commuters, and coordinated transit systems and infrastructure have resulted in a decreased number of single-occupant automobile trips. These three measures have reduced the impact of auto traffic during peak commuting hours.
- Lexington has a strategic plan for transportation. Its citizens, employees, businesses, and town government agree on and are committed to this plan. Programs and procedures are in place to maintain and refine the transportation system and its infrastructure on a continuing basis.
- Hanscom remains a general aviation airport with acceptable noise levels due to advances in technology and compliance with strict regulations. There has been no increase in traffic congestion related to the airport over the past 20 years.
- Commercial traffic does not contribute to the general traffic and parking congestion of Lexington.
- Lexington residents have a strong tradition of community activism and responsibility, which is reflected in their involvement in local and regional transportation planning. Joint transportation programs and policies with neighboring communities are an important part of this planning.
- The character of Lexington as a historically significant place and an attractive tourist destination is preserved through controlled growth of transportation and the availability of alternative modes of transportation.
- Lexington's town center remains essential to the quality of life of the community, and the influence of Lexington's transportation plan has kept the center accessible, accommodating, and free from traffic congestion.

Section IV: The Visions

Vision Statement : Managing Fiscal Stability

Lexington prides itself on a high quality of life and excellent public services. This quality of life comes at an expense, which has historically outpaced the limits of Proposition 2½. To meet these expense needs, the Town has become more dependent on periodic overrides and debt exclusions to support year-to-year increases. This has placed a greater financial burden on property owners in the Town, which raises concerns about affordability, and many citizens, while advocates of these high quality services, may question the effectiveness of the Town's fiscal process.

The vision of Lexington 2020 is to create a fiscal process that is both more visible and understandable to, and invites the participation of, its citizens. The objective of the process is to create a collective sense that the citizens get high value for their taxes—a high sense of “worth what paid for.” This means that the expenditure decisions take into explicit account the tradeoffs among the core values of the town and that the revenues are raised in a way that limits tax “volatility” and the burden on those with limited means, especially young families and those on fixed income. The sense of “worth what paid for” will come from an understanding of Town operations and an increased level of accountability for expenditures.

Integral to this vision is a well-informed populace, improved reporting, accountability, and communications channels with the availability of easily accessible and understandable information. This vision relies on the continued use of long-range fiscal planning, research into creative and alternative sources of revenue, and increasing use of expanding communications technology.